DDRS Interactive Budget Tool

User Guide

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1. The DDRS Interactive Budget Tool

The DDRS Interactive Budget Tool is a web-based software program that you can use to create, store, and print budgets for developmentally disabled (DD) consumers in the Division of Disability and Rehabilitative Services (DDRS) case management system. After you create a budget, you can print a hard copy of the budget to forward to a healthcare provider.

1.1. Product Support

If you encounter a problem with the Interactive Budget Tool, or if you have a question or recommendation regarding this user guide, log a HelpBox request. A member of the FSSA Technology Services Team (FTST) will contact you to address the issue.

1.2. Installing and Testing the Latest Version of Adobe Reader

You can access the most updated copy of this user guide and other documentation from the DDRS website. To view the documents, you must install the Adobe Reader on your computer. Use the following procedure to install and test the latest version of Adobe Reader on your computer (the procedure assumes that you have not installed the Adobe DLM ActiveX control).
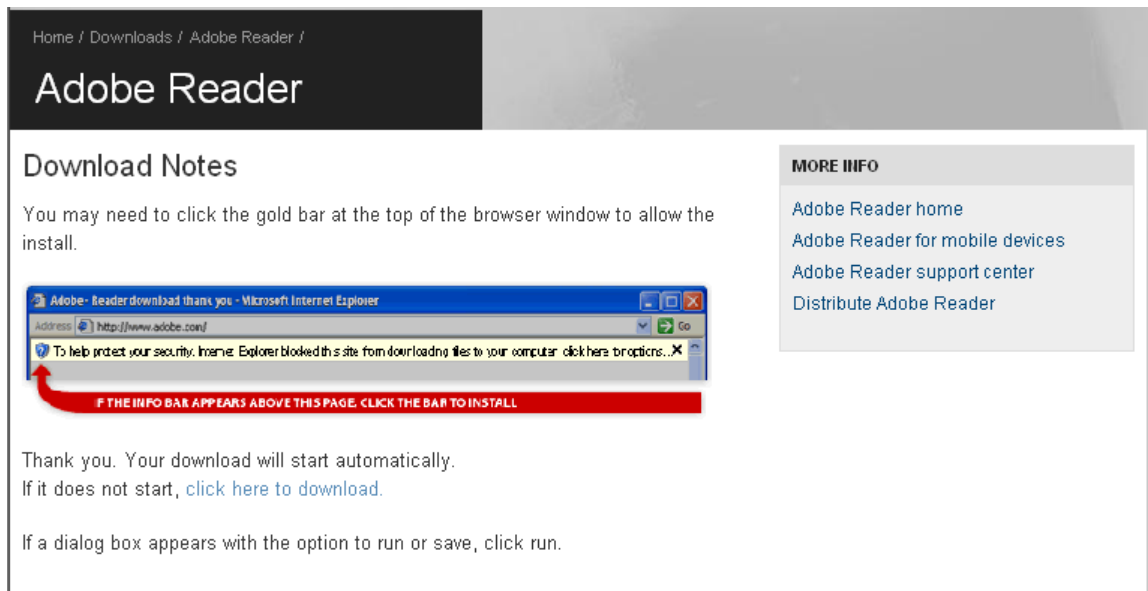
1. Select the following link or enter the URL into the **Address** field of your browser:

   http://www.adobe.com/products/acrobat/readstep2.html

   The Adobe Reader web page appears, as shown in the following illustration:

2. Select the gold Download button. The system displays the following screen and a gold bar appears at the top of your browser window:


3. Select **Click here to install** from the gold bar at the top of the browser window, and then select **Install ActiveX Control** from the shortcut menu that appears.

4. Select **Install** in the **Internet Explorer - Security Warning** window that appears.

5. Wait several seconds as one or more Adobe progress windows appear, indicating the progress of the installation. When the installation is complete, the **getPlus: Info** window appears and indicates that the installation is complete.

6. Select **OK** in the **getPlus: Info** window.

7. Test the Adobe Reader installation by selecting a PDF file from either the network or a SharePoint site.

Tip

Select the following link to display a SharePoint page that contains multiple PDF files that you can use:

https://myshare.in.gov/FSSA/ddrs/WebBased%20Tools/Forms/AllItems.aspx

8. Ensure that the **Read Only** radio button is selected in the **Microsoft Internet Explorer** window that appears and then select **OK**. The following illustration shows an example of the **Microsoft Internet Explorer** window:
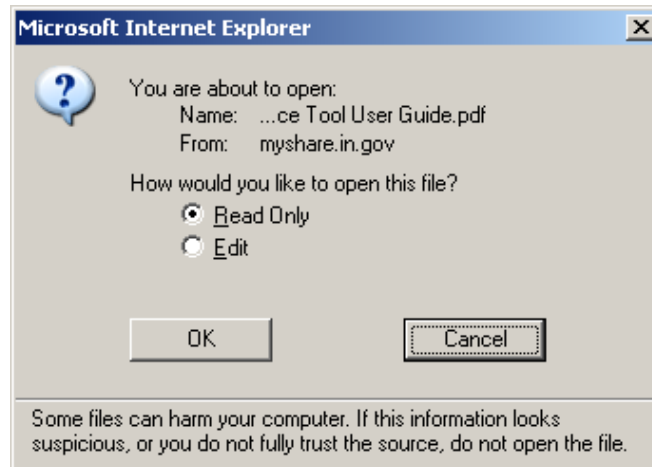
Because this is the first PDF you have opened after installing the Adobe Reader, the **Adobe Reader – License Agreement** window appears, as shown in the following illustration:
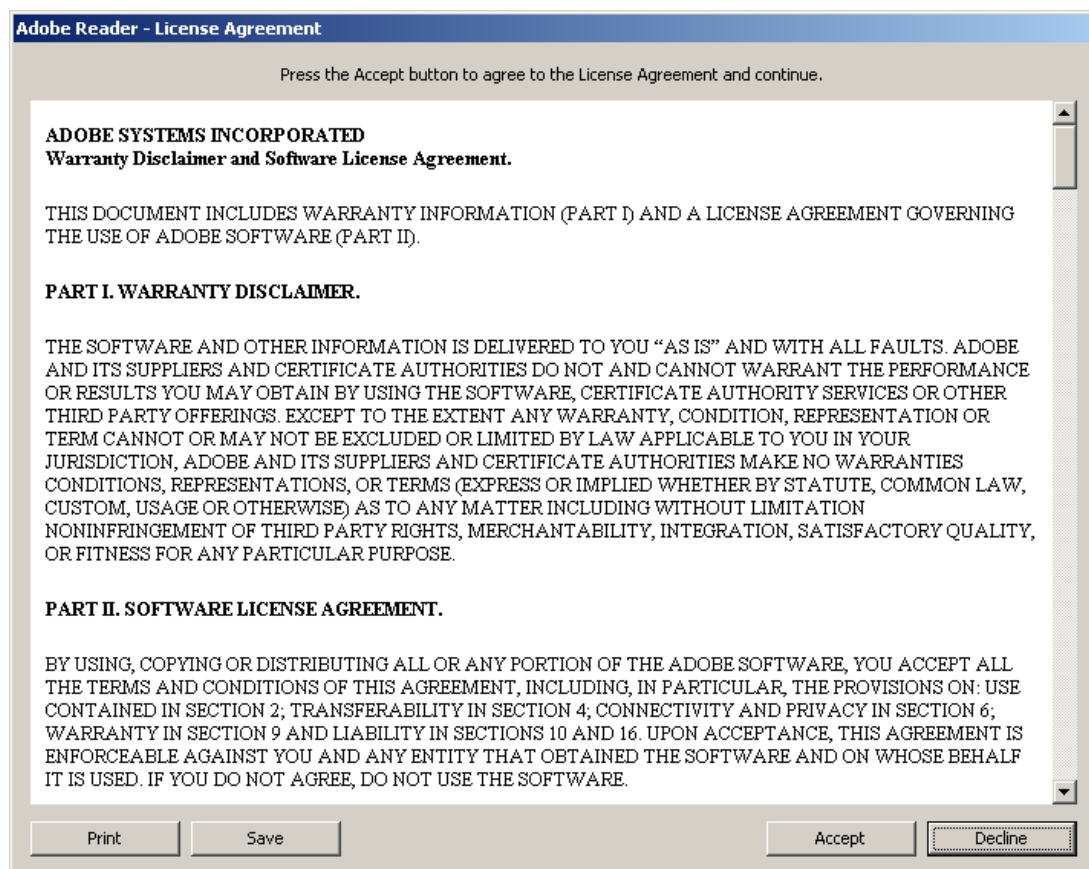
9. Select **Accept** to display the PDF file for the document you selected.

   The **Adobe Reader – License Agreement** window appears only once. After you perform the remaining steps in this procedure, the license agreement will not appear again when you select a PDF file.

2. Accessing the Interactive Budget Tool

To access the Interactive Budget Tool, select the following link or manually enter the URL into your browser's **Address** field:

   https://ddrsprovider.fssa.in.gov/BDDS/Default.aspx

The DDRS Web-Based Tools welcome screen appears. Select **Interactive Budget Tool** under **BDDS Links** on the left side of the screen, as shown in the following illustration:

The initial Interactive Budget Tool screen appears, as shown in the following illustration:

Important

You should read the following message at least once. This message appears on all Interactive Budget Tool screens:

This tool is to be used for planning purposes only. Completion of a budget using this tool does not indicate approval of desired services or budget amount. An IPMG case manager will be responsible for submitting a final budget to DDRS for review after a consumer's team has met.

The following table describes the links at the top of the Interactive Budget Tool screen.

Interactive Budget Tool Links

Link	Description
Saved Budgets	Displays the budgets that you have created and saved.
Create New Budget	Displays the **Contact Info** tab that you can use to begin the process of creating a budget.
Service Definitions	Displays the *HCBS Waiver Consumer Manual* that you can use to research the services available.
Calculator	Displays an electronic calculator in a separate window that you can use to perform calculations.
Paper Version	Displays a report version of the Interactive Budget Tool screens that you can use to manually complete a budget.
Question?	Displays the **IBT Question Assistance** window that you can use to send an email to the OASIS ICAP helpline.

3. Creating a Budget by Using the Interactive Budget Tool

Select the **Create New Budget** link at the top of the Interactive Budget Tool screen. The **Contact Info** tab appears and displays fields that you can use to add the consumer's personal information. The following illustration shows an example of completed personal information fields.

Complete as many fields in the **Contact Info** tab as possible and then select the **Save and Continue** button.

The system displays the appropriate waiver tab, which contains the service fields for the budget. An example of a waiver tab appears on the next page. Enter one or more values in the service fields as appropriate for the level of care required for the consumer.
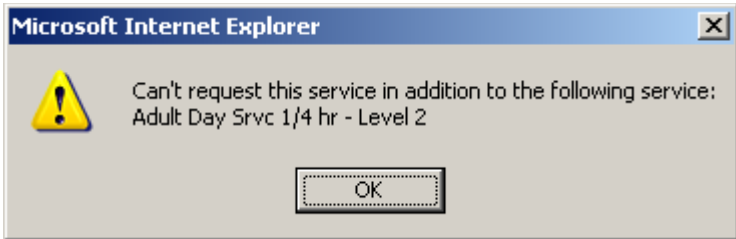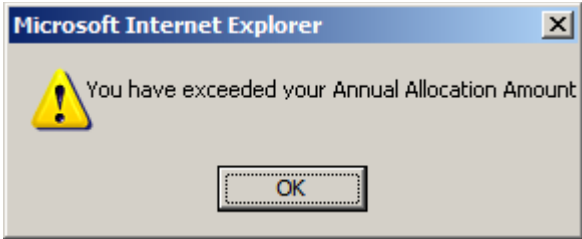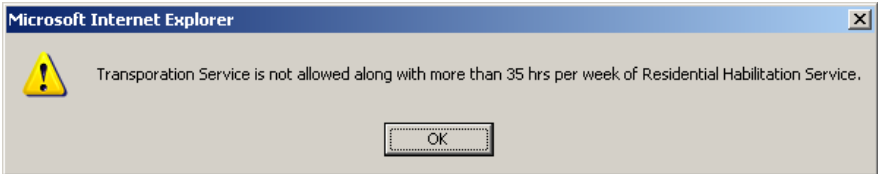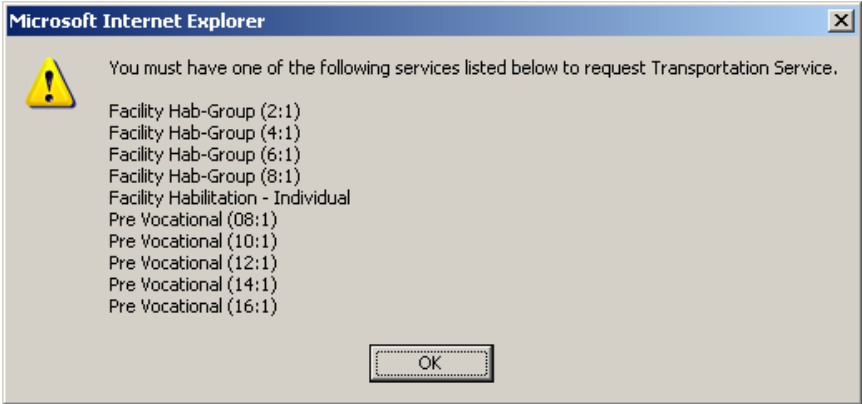
The following illustration shows an example of a waiver tab:

| Contact Info | Autism Waiver |

Total Monthly Amount: $1,190.46   **Annual Amount:** $14,285.52   **Amount Remaining:** $5,714.48
Allocation Amount: $20,000.00

✖ = To clear out unit requested per month.

Services	Consumers : Staff	Units Requested Per Month		Rate	Units	Extended
Group: Adult Day Services (* Not Day Habilitation or Residential Habilitation)						
Adult Day Service - Level 1 *			✖	$21.95	4 HOUR	$0.00
Adult Day Service - Level 2 *			✖	$28.80	4 HOUR	$0.00
Adult Day Service - Level 3 *			✖	$34.29	4 HOUR	$0.00
Adult Day Srvc 1/4 Hr - Level 1 *		Calculate	✖	$1.38	1/4 HOUR	$0.00
Adult Day Srvc 1/4 hr - Level 2 *		Calculate 347.20	✖	$1.80	1/4 HOUR	$624.96
Adult Day Srvc 1/4 Hr - Level 3 *		Calculate	✖	$2.14	1/4 HOUR	$0.00
Group: Adult Foster Care (* Not Day Habilitation or Residential Habilitation)						
Adult Foster Care - Lvl 1- Day *			✖	$51.87	8 HOUR	$0.00
Adult Foster Care - Lvl 2 -Day *			✖	$75.67	8 HOUR	$0.00
Adult Foster Care - Lvl 3- Day *			✖	$102.87	8 HOUR	$0.00
Group: Behavioral Supports						
Behavior Management		Calculate	✖	$18.20	1/4 HOUR	$0.00
Group: Day Habilitation						
Community Hab-Group (2:1)	2:1	Calculate 43.40	✖	$13.03	1 HOUR	$565.50
Community Hab-Group (3:1)	3:1	Calculate	✖	$8.69	1 HOUR	$0.00
Community Hab-Group (4:1)	4:1	Calculate	✖	$6.52	1 HOUR	$0.00
Community Habilitation - Individual	1:1	Calculate	✖	$25.00	1 HOUR	$0.00
Facility Hab-Group (2:1)	2:1	Calculate	✖	$14.76	1 HOUR	$0.00
Facility Hab-Group (4:1)	4:1	Calculate	✖	$7.38	1 HOUR	$0.00
Facility Hab-Group (6:1)	6:1	Calculate	✖	$4.92	1 HOUR	$0.00
Facility Hab-Group (8:1)	8:1	Calculate	✖	$3.69	1 HOUR	$0.00
Facility Habilitation - Individual	1:1	Calculate	✖	$23.48	1 HOUR	$0.00
Pre Vocational (08:1)	8:1	Calculate	✖	$6.00	1 HOUR	$0.00
Pre Vocational (10:1)	10:1	Calculate	✖	$4.80	1 HOUR	$0.00
Pre Vocational (12:1)	12:1	Calculate	✖	$4.00	1 HOUR	$0.00
Pre Vocational (14:1)	14:1	Calculate	✖	$3.42	1 HOUR	$0.00
Pre Vocational (16:1)	16:1	Calculate	✖	$3.00	1 HOUR	$0.00
Group: Equipment Supports						
Equipment Assess/Inspect/Train		Calculate	✖	$17.99	1/4 HOUR	$0.00
Group: Family & Care Giver Training						
Family & Care Training - Family		⦿ No ◯ Yes	✖	$2,000.00	1 ANNUAL	$0.00
Family & Care Training - Non-Family		⦿ No ◯ Yes	✖	$2,000.00	1 ANNUAL	$0.00
Group: Personal Emergency Response System						
Personal Emergency Response System Install		⦿ No ◯ Yes	✖	$52.07	ONE TIME	$0.00
Personal Emergency Response System Monthly			✖	$52.07	1 MONTH	$0.00
Group: Rent & Food for Unrelated						
Rent & Food for Unrelated Live			✖	$545.00	1 MONTH	$0.00

The following table displays some of the business rules that exist for the service fields and the alert message that appears when each business rule is broken. If you receive one of these messages, select **OK** and refine the service selections.

Business Rules and Alert Messages

Business Rule	Alert Message
You cannot enter more than one value in the desired section.	**Microsoft Internet Explorer** ⚠ Can't request this service in addition to the following service: Adult Day Srvc 1/4 hr - Level 2 [OK]
You cannot select more units in a group of calculated fields than the system permits.	**Microsoft Internet Explorer** ⚠ The calculated fields in this group of services have a combined limit of 12 [OK]
The cost of your selected services cannot exceed the allocation amount shown at the top of the waiver tab.	**Microsoft Internet Explorer** ⚠ You have exceeded your Annual Allocation Amount [OK]
You cannot request transportation services if you have also requested more than 35 hours per week (152 hours per month) of Residential Habilitation Service.	**Microsoft Internet Explorer** ⚠ Transporation Service is not allowed along with more than 35 hrs per week of Residential Habilitation Service. [OK]
You must have selected one or more of the services shown in the illustration before you can request transportation services.	**Microsoft Internet Explorer** ⚠ You must have one of the following services listed below to request Transportation Service. Facility Hab-Group (2:1) Facility Hab-Group (4:1) Facility Hab-Group (6:1) Facility Hab-Group (8:1) Facility Habilitation - Individual Pre Vocational (08:1) Pre Vocational (10:1) Pre Vocational (12:1) Pre Vocational (14:1) Pre Vocational (16:1) [OK]

3.1. Using Calculated Fields and the Calculator Tool

Some of the service fields on the waiver tab contain a **Calculate** link that you can use to calculate the number of units required for that service. When you select **Calculate**, the **Service Calculator** window appears, as shown in the following example:

To use a **Service Calculator** window, complete the entries for all of the fields and select **Calculate**. The system updates the read-only values and activates the **Save** button. Select **Save** to update the information on the waiver tab.

In addition to using calculated fields, you can select the **Calculator** link at the top of the Interactive Budget Tool screen to display an electronic calculator that appears in a separate window. The following illustration shows an example of the calculator and calls out the four basic arithmetic buttons:
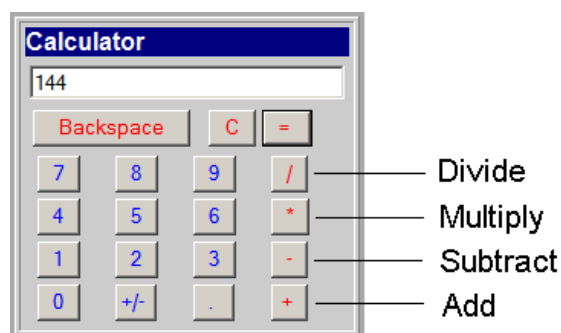
3.2. Reviewing Service Definitions

While completing the service fields in a waiver tab, you might need to review or search for a service definition. You can review the definitions of the services available to you by selecting the **Service Definitions** link at the top of the Interactive Budget Tool screen. The **Choose a Manual** window appears, as shown in the following illustration:
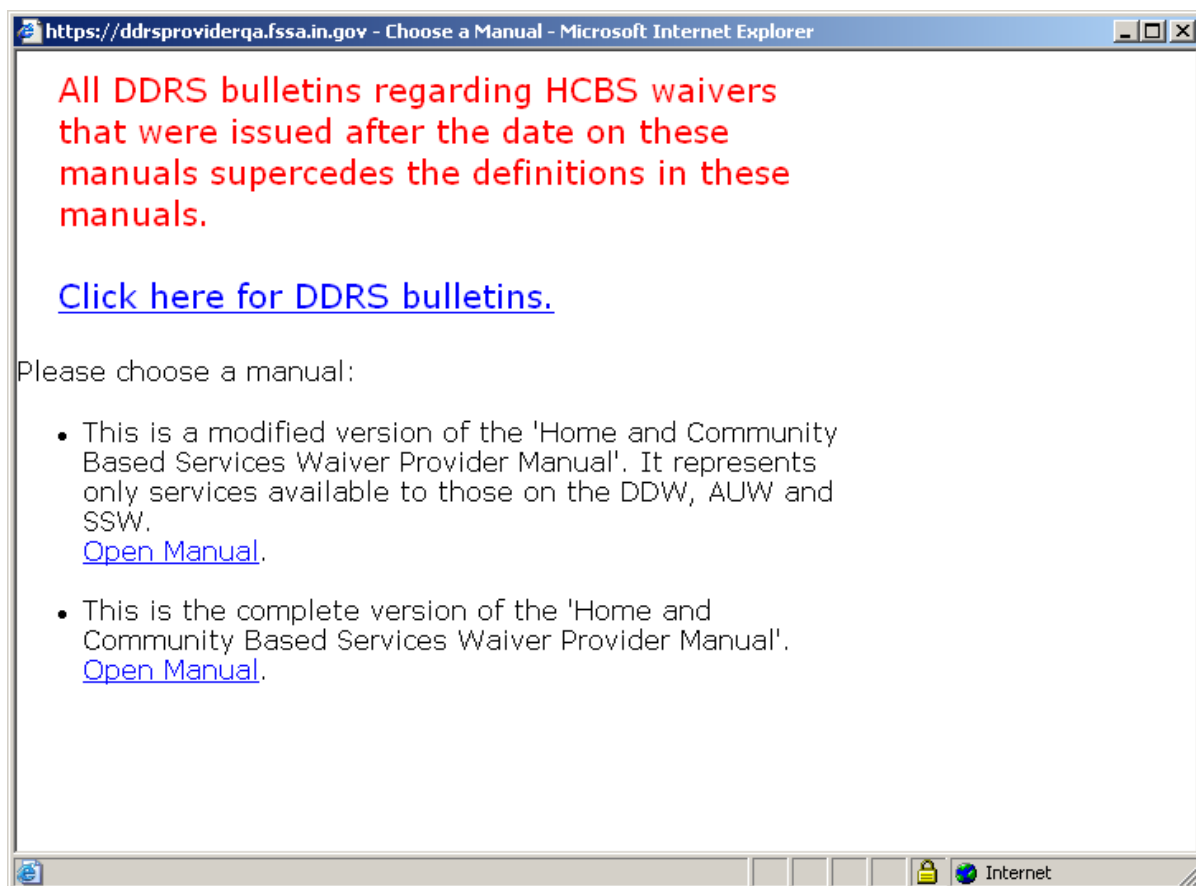
You can also use the **Choose a Manual** window to:

- View the **DDRS Bulletins** document library on the DDRS Provider website.
- Open the *Home and Community Based Services Waiver Consumer Manual*.
- Open the *Home and Community Based Services Waiver Provider Manual*.

Select the **Open Manual** link in the first bullet to review the service definitions for consumers on the DD, Autism, and SS waiver.

When you select the **Open Manual** link in the first bullet, the *Home and Community Based Services Waiver Consumer Manual* appears. The following illustration shows a partial example of the type of information that appears in this manual:

Adult Day Services

Service Definition

Adult Day Services are community-based group programs designed to meet the needs of adults with impairments through individual plans of care. These structured, comprehensive, non-residential programs provide health, social, recreational, and therapeutic activities, supervision, support services, and personal care. Meals and/or nutritious snacks are required. The meals cannot constitute the full daily nutritional regimen. However, each meal must meet 1/3 of the daily Recommended Dietary Allowance. These services must be provided in a congregate, protective setting.

Individuals attend Adult Day Services on a planned basis. A minimum of 3 hours to a maximum of 12 hours shall be allowable. The three levels of Adult Day Services are Basic, Enhanced, and Intensive.

A ½ day unit is defined as one unit of three hours to a maximum five hours/day. Two units is more than five hours to a maximum of eight hours/day. Maximum two units/day.

A ¼ hour unit is defined as 15 minutes. Billable only after eight hours of ADS service have been provided on the same day. Maximum 16 units/day.

Allowable Activities

Basic Adult Day Services (Level 1)

- Monitor and/or supervise all activities of daily living (ADLs) defined as dressing, bathing, grooming, eating, walking, and toileting with hands-on assistance provided as needed.
- Comprehensive, therapeutic activities.
- Health assessment and intermittent monitoring of health status.
- Monitor medication or medication administration.
- Appropriate structure and supervision for those with mild cognitive impairment.
- Minimum staff ratio: One staff for each eight individuals.

Enhanced Adult Day Services (Level 2)

Level 1 service **requirements** must be met. Additional services include:

- Hands-on assistance with two or more ADLs or hands-on assistance with bathing or other personal care.

3.3. Saving a Budget

At any time while completing the service fields in a waiver tab, you can select the **Save** button in the upper right corner of the budget screen, as shown in the following illustration:

When you select **Save**, the system saves the budget on your computer. You can view the saved budgets on your computer by selecting the **Saved Budgets** link at the top of the Interactive Budget Tool screen. Saved budgets appear in a grid, as shown in the following illustration:

You can select the links in the far right columns to:

- Select a budget so that you can make changes.
- Delete a budget that you have completed and printed.
- Save or print a budget report.

You can delete all of the budgets on the grid by selecting the **Please check here if you are using a public computer** check box. The system displays the **Delete All Budgets** link above the check box, as shown in the following illustration:

Delete ALL Budgets
☑ Please check here if you are using a public computer

Important

When you select the **Delete All Budgets** link, the system deletes all of the saved budgets in the grid, regardless of whether you have completed or printed them.

3.4. Saving or Printing a Budget Report

When you select the **Report** link from the saved budgets grid, the system displays the budget report on your screen. The following illustration shows an example of a displayed budget report:

Saved Budgets   Create New Budget   Service Definitions   Calculator   Paper Version   Question?

Print... Email This Report

| ◄◄ | ◄ | 1 | of 1 | ▷ | ▷▌ | 100% ▼ | | Find | Next | Select a format ▼ | Export | ⟳ |

State of Indiana

Division of Disability and Rehabilitative Services

Report Date: 6/20/2008

"Interactive Budget Tool"

Name: Jane E. Doe

Budget Month: June, 2008

Service Description	Service Rate	Service Unit	Monthly Cost
Adult Day Services			
Adult Day Srvc 1/4 Hr - Level 1	$1.38	347.2	$479.14
Day Habilitation			
Pre Vocational	$24.10	7.23	$174.24
Residential Habilitation			
Residntl Habilitation\Supports	$23.74	81.01	$1,923.18
		Monthly Total:	$2,576.56
		Annual Total:	$30,918.68
		Annual Allotment:	$60,000.00

To either print or save the report, select the **Print** link from the toolbar. The system displays the **File Download** window, as shown in the following illustration:
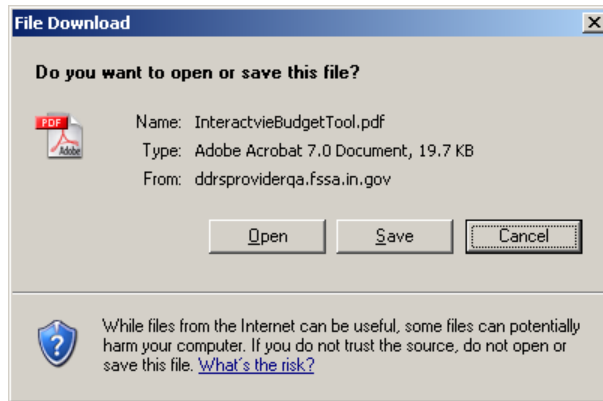
Select **Open** to display the report or **Save** to save the report.

When you select **Open**, the system displays the report as a PDF file in a separate **Adobe Reader** window. You can use the typical printing and saving features in the **Adobe Reader** window to print the report. For example, you can:

- Use the **Print** icon on the standard toolbar to print the report.
- Use the **File > Print** menu on the menu bar to print the report.
- Use the **File > Save As** menu on the menu bar to save a copy of the report.

When you select **Save** from the **File Download** window, the **Save As** window appears so that you can save the report as a PDF file in your desired folder.

You can also select the **Email This Report** link above the toolbar to send an email message that contains a link to the budget report. The **Report Mailer** window appears and prompts you to enter:

- Your email address
- Your Case Manager's email address
- An optional message

You can then select the **Send** button to send the email message.

3.5. Completing a Paper Version of a Budget in the Interactive Budget Tool

The Interactive Budget Tool provides the option to complete a budget by hand. When you select the **Paper Version** link at the top of the Interactive Budget Tool screen, the system prompts you for the waiver type. You must select the waiver type from the **Select Waiver Type** field, as shown in the following illustration:

After you select the waiver type, the system generates and displays a report of the **Interactive Budget Tool** fields. For best results when printing, export the report to a PDF file by using the following steps:

1. Select **Acrobat (PDF) file** from the **Select a format** field in the report toolbar.
2. Select **Export** beside the **Select a format** field, as shown in the following illustration:

When completing the paper-based **Interactive Budget Tool** report, you must manually calculate some of the values. The numbers in the **Footnote** column on the report correspond to the required calculation. The following table describes each calculation:

Interactive Budget Tool Calculations

Footnote	Calculation
*	Allow only 1 unit per year. Do not multiply the Extended Amount by 12 for annual amount.
1	**¼ Hour** 1) Multiply the number of service hours per day by the number of service days required per week to determine the total weekly service hours. 2) Multiply the total weekly service hours by 4 to derive the total number of units. 3) Multiply the number of units by 4.34 (the average number of weeks in a month) to determine the quantity. 4) Enter the quantity in the **Quantity Requested** column. 5) Multiply the quantity by the dollar amount in the **Service Rate** column. 6) Enter the resulting dollar amount in the **Extended** column. **Example for a 20-Hour Week with a Service Rate of $2.14** (20 * 4) * 4.34 = 347.2 entered in the **Quantity Requested** column. 347.2 * 2.14 = $743.01 entered in the **Extended** column
2	**Ratio** 1) Multiply the number of service hours required per week by 4.34 (the average number of weeks in a month) to determine the monthly quantity. 2) Enter the monthly quantity in the **Quantity Requested** column. 3) Multiply the quantity by the dollar amount in the **Service Rate** column. 4) Enter the resulting dollar amount in the **Extended** column. **Example for a 40-Hour Week and a Service Rate of $6.00** 40 * 4.34 = 173.6 entered in the **Quantity Requested** column 173.6 * 6.00 = $1041.60 entered in the **Extended** column

Interactive Budget Tool Calculations

Footnote	Calculation
3	**Residential Habilitation** 1) Determine the number of staff hours required per week. **Important** If the consumer is assigned Residential Habilitation care 24 hours per day, 7 days per week **AND** receives any Day Habilitation care (Footnote 2), you MUST subtract the weekly Day Habilitation hours from the staff hours in Step 1 to derive the total weekly hours to use in Step 2 (see example below). 2) Divide the total weekly hours by the total number of roommates + 1. Multiply the result by 4.34 to determine the quantity. 3) Enter the quantity in the **Quantity Requested** column. 4) Multiply the quantity by the dollar amount in the **Service Rate** column. 5) Enter the resulting dollar amount in the **Extended** column. **Example for a 9-to-5 Staff Person Providing Services to You and 3 Roommates** $[(8 * 5) / 4] * 4.34 = 43.4$ $43.4 * 23.74 = \$1,030.32$ entered in the **Extended** column **Example for a 24-Hour Staff Person Providing Services to You and 3 Roommates, and You Receive 4 Day Habilitation Hours Per Day** $[((24 * 7) - (4 * 7)) / 4] * 4.34 = 151.9$ $151.9 * 23.74 = \$3,606.11$ entered in the **Extended** column
4	**Behavioral Management** Enter the hours per month you would like a Behavior Specialist to see you. DDRS will double this amount to account for the time a specialist is working on your case, but does not actually see the consumer. DDRS will also automatically add 2 units of service to account for the time a PHD level specialist reviews the work of your Behavior Specialist as required by State Administrative Rule.
5	**Supported Employment - Tier 1 (1 - 5 Hours/Month), Tier 2 (6 - 10 Hours/Month), Tier 3 (11 - 15 Hours/Month)** How many months of these services do you want? The total number of months of the these services must be equal to or less than 12. Do not multiply the Monthly Cost Amount by 12 for annual amount. **Supported Employment - Tier 4 (16 or more hours per month):** How many hours per month do you want? Monthly Cost = Quantity Requested * Service Rate